

Appendix B

California Mathematics Initiative for Teaching Report to the Legislature

California Mathematics Initiative for Teaching A Report to the Legislature



**State of California
Arnold Schwarzenegger, Governor**



**California Commission on Teacher Credentialing Report 03-XX
December 2003**

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Table of Contents

California Mathematics Initiative for Teaching A Report to the Legislature

Executive Summary	1
Statutory Provisions	5
Loan Forgiveness Program	5
Local Program Selection and Funding	6
Statewide Funding Levels	8
Program and Participant Information	8
Program Coordination and Reporting Requirements	9
Participating Teacher Progress/Program Results	10
Standards for the Supplementary Authorization in Mathematics	11
Lessons Learned – Loan Forgiveness Program	12
Forgivable Loan Structure	12
Effects of Cap on Administrative Costs`	13
Complications in Providing Teaching Service under Current Conditions	13
Recommendations on Program Continuation, Modification or Termination	14
Appendix – Selected Comments from Local Program Directors	15

Executive Summary

California Mathematics Initiative for Teaching A Report to the Legislature December 2003

The California Mathematics Initiative for Teaching was established in 1998 to address the state's shortage of certified K-12 mathematics teachers by providing funding resources to prospective mathematics teachers and developing alternative routes to mathematics teacher certification.

Under this statute, the California Commission on Teacher Credentialing (Commission) was authorized to:

- administer a loan forgiveness program through participating school districts and county offices of education (*E.C. §44402(a) et seq.*); and,
- establish standards for supplementary authorizations, including supplementary authorizations in mathematics (*E.C. § 44402(c)*).

Loan Forgiveness Program

The Commission distributed state funding for this program to participating local education agencies to serve teachers in their service areas. Program funds paid the costs of tuition, academic fees and textbooks for courses leading to mathematics certification or mathematics professional development.

In return for the funding received through this program, teachers were required to “teach mathematics for one year in a public elementary or secondary school for each multiple of \$2,500 of financial assistance that the program participant receives.”

Because the program will continue to operate through June 2004, information on program participation has yet to be fully completed. The results to date are as follows:

- A limited number of local education agencies proposed to establish local programs. Over the course of the program, agencies requested only \$3.5 million of the over \$5 million made available by the state for this purpose.

- As of June 30, 2003, participating teachers had completed a total of 4,974 semester units (or the quarter-unit equivalent) in mathematics subject matter or pedagogical coursework, an average of 17.8 semester units per participant.
- Funding distributed to participating teachers as of June 30, 2003 totaled \$1,160,709.98, for an average cost of \$233.36 per unit. At minimum, it is estimated that an additional \$500,000 will have been distributed by local education agencies to participating teachers in the 2003-04 fiscal year.

Information collected in assembling this report indicates that the Loan Forgiveness Program suffered from diminished enrollment since its inception, both in the number of local education agencies proposing to establish local programs and in the number of individual participating teachers. Consequently, less than 70% of state funding for this program was distributed to local education agencies to establish local programs, and less than 44% of that funding was used by individual teachers to complete mathematics coursework. All unused funds have been or will be returned to the State General Fund. Causes for these enrollment challenges may include:

- *Forgivable Loan Structure.* The structure was challenging to agencies administering local programs due to difficulties in tracking participant progress and the potential need to recover funds from those participants who did not complete their required teaching service. This structure also may have discouraged individual teachers from participating due to a requirement for a long-term teaching commitment at a time when prospects for future employment are uncertain.
- *Effect of Cap on Administrative Costs.* The statute limits the use of grant funds for local program administrative costs to 6.5% of the total grant amount. Given that participating agencies' indirect costs often surpass this level, local programs found it challenging to fund their administrative costs associated with implementing this program. This factor may also have affected the ability of some local programs to recruit participants.

Supplementary Authorization in Mathematics

The Commission worked with an advisory panel of mathematics educators in 1999 to develop a set of draft program standards for the mathematics supplementary authorization. After a field review, the Commission adopted the *Standards of Quality and Effectiveness for Programs of Supplementary Authorization in Mathematics* at its meeting on March 8, 2000.

Despite broad distribution of these standards, the Commission received no proposed supplementary authorization program proposals until March 2003. Concurrent with the Commission's review of this proposal, changes to teacher assignment options resulting from the federal *No Child Left Behind Act (NCLB)*

may affect the use of supplementary authorizations. Work on this aspect of the statute has since been suspended pending final resolution of this issue by the U.S. Department of Education and the State Board of Education.

Recommendations for Program Continuation, Modification or Termination

While the Commission supports efforts to recruit qualified and competent teachers, particularly in chronic shortage areas such as mathematics, concerns about the structure of this program lead to the recommendation that this program sunset on June 30, 2004, as initially established in the statute. Lessons learned from the implementation of this program suggest that, in the future, similar programs may be more successful with a different loan and administrative structure.

Notice Regarding the Preparation of This Report

Education Code Section 44403 requires the Commission to provide this report to the California Legislature. This section states:

Subject to an appropriation of sufficient funds to the commission for this purpose, the commission shall base its report on an evaluation of the California Mathematics Initiative for Teaching by an independent contractor selected in consultation with the office of the Legislative Analyst. If, in the judgment of the Commission, available funds are insufficient to contract for an independent evaluation, the commission shall base its report on information received from school districts and county superintendents of schools pursuant to subdivision (e) of Section 44402.

The Commission did not receive an appropriation for the evaluation referenced above and determined that funds were insufficient to contract for an independent evaluator. This report is based on information received through reports from participating school districts and county offices of education pursuant to E.C §44402.

California Mathematics Initiative for Teaching

A Report to the Legislature

Statutory Provisions

The California Mathematics Initiative for Teaching was established to address the state's chronic shortage of mathematics teachers. Assembly Bill 496 (Lempert, Chapter 545, Statutes of 1998) was enacted "for the general purpose of increasing the number of teachers who are competent and certificated to teach mathematics in the public elementary and secondary schools in this state." This legislation authorized the California Commission on Teacher Credentialing (Commission) to:

- administer a loan forgiveness program through participating school districts and county offices of education (*E.C. §44402(a) et seq.*); and,
- establish standards for supplementary authorizations, including supplementary authorizations in mathematics (*E.C. § 44402(c)*).

Loan Forgiveness Program

Assembly Bill 496 authorized the Commission to award grants to school districts and county offices of education that volunteered to establish programs to provide financial assistance to teachers interested in obtaining mathematics teacher certification or to teachers who wanted to increase their competency to teach mathematics. The California Mathematics Initiative for Teaching program is scheduled to become inoperative on June 30, 2004. Participating teachers who do not complete required coursework by this date must complete remaining coursework at their own cost.

Program funds were to be used to cover the costs of tuition, academic fees and textbooks for courses leading to mathematics certification or mathematics professional development. In return for the funding received through this program, teachers were required to "teach mathematics for one year in a public elementary or secondary school for each multiple of \$2,500 of financial assistance that the program participant received."

Participating teachers failing to achieve their teaching authorization are required to repay the financial assistance received through this program. The statute limits the total funding a teacher may receive through this program to \$7,500, and limits expenditures at participating school districts and county offices for program administration costs to 6.5% of the total grant.

Those local education agencies interested in establishing local programs were required to submit proposals based on Commission-developed requirements and selection criteria. The Commission established program grant conditions to which each grant recipient was required to comply. These grant conditions included the statutory limitations previously noted, identified populations eligible for funding, provided local program reporting requirements, and required local programs to enter into loan agreements with each participating teacher. The loan agreements specified the expenses to which program funds could be applied, the teaching service obligation participants incurred in accepting program funds, and the requirement for participants who did not fulfill their service obligation to repay funds received through the program.

Local Program Selection and Funding

The California Mathematics Initiative for Teaching loan forgiveness program was initiated in three phases. In March 1999, the Commission released the first Request for Proposals (RFP) for this program to local education agencies interested in establishing programs in the first phase, during which local programs served participants in fiscal years 1999-2000, 2000-2001 and 2001-2002. The RFP established selection criteria for prospective participating agencies as follows:

1. Demonstrated local need for the program;
2. Comprehensive plan for addressing local shortages of qualified mathematics teachers;
3. Description of local prospective participants;
4. Quality of program design and plan for ongoing participant support; and,
5. Cost effectiveness, including detailed three-year program budget.¹

The Commission distributed the RFP to all public school districts and county offices of education in the state, as well as California Mathematics Project Directors. The Commission received a total of 12 proposals, all of which were deemed suitable for funding.

The Commission initiated a second RFP process in February 2000 for the purpose of recruiting new local education agencies to initiate programs. In this second phase, local programs served participants during fiscal years 2000-2001, 2001-2002 and 2002-2003. The Commission received a total of five proposals, and all were deemed suitable for funding.

The RFP for the third phase was distributed in December 2000. The early release of the RFP combined with substantial recruitment efforts with existing pre-intern

¹ Local programs were established for three-year terms to allow program participants sufficient time to complete required coursework.

and internship program sponsors resulted in the submission of 24 responses. All phase-three responses were deemed suitable for funding. Local programs initiated in the third phase continue to operate, as they were funded to serve participants during fiscal years 2001-2002, 2002-2003, and 2003-2004.

The Commission provided funding to local education agencies for each phase of the program as shown on Table 1 on the following page.

Table 1
Funding for California Mathematics Initiative Programs

Phase 1	
Local Education Agency	Funding Amount
Alameda Unified School District	\$ 45,262.00
Alhambra Unified School District	\$ 19,106.00
Antelope Valley Union High School District	\$ 37,500.00
Coachella Valley Unified School District	\$ 27,690.00
East Side Union High School District	\$ 86,904.00
Exeter Unified School District	\$ 29,250.00
Fremont Unified School District	\$ 213,881.00
Glendale Unified School District	\$ 56,232.00
Kingsburg Unified School District	\$ 5,325.00
Los Angeles Unified School District	\$ 149,100.00
Marin County Office of Education	\$ 79,875.00
Santa Cruz Unified School District	\$ 98,512.00
Total	\$ 848,637.00

Phase 2	
Fresno Unified School District	\$ 463,906.88
Lemoore Union High School District	\$ 29,288.00
Lennox School District	\$ 70,381.00
Pasadena Unified School District	\$ 91,177.00
San Joaquin County Office of Education	\$ 66,563.00
Total	\$ 721,315.88

Phase 3	
Amador County Unified School District	\$ 7,668.00
Barstow Unified School District	\$ 136,320.00
Brawley Union High School District	\$ 17,062.00
Desert Sands Unified School District	\$ 108,490.00
Dinuba Unified School District	\$ 5,964.00
Downey Unified School District	\$ 35,243.00
Hemet Unified School District	\$ 25,472.00
Imperial Unified School District	\$ 93,188.00
Pasadena Unified School District	\$ 104,480.00
Kern Union High School District	\$ 80,003.00
Kings County Office of Education	\$ 38,437.00
Lindsay Unified School District	\$ 113,883.00
Merced County Office of Education	\$ 49,789.00
Moreno Valley Unified School District	\$ 35,145.00
Napa Valley Unified School District	\$ 66,004.00
Rialto Unified School District	\$ 41,919.00
Sacramento City Unified School District	\$ 164,932.00
Sacramento County Office of Education	\$ 133,124.00
San Diego City Unified School District	\$ 142,343.00
San Mateo Union High School District	\$ 37,808.00
Sequoia Union High School District	\$ 31,950.00
Sonoma County Office of Education	\$ 42,840.00
Ventura County Superintendent of Schools	\$ 316,250.00
William S. Hart Union High School District	\$ 106,500.00
Total	\$ 1,934,814.00

Grand Total of Funds Distributed During Three Phases	\$ 3,504,766.88
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Statewide Funding Levels

The limited number of proposals received and funded resulted in the distribution of substantially fewer funds than the state budget made available. Undistributed program funds reverted to the State General Fund. Possible causes for the limited number of local program proposals are discussed in a later section of this report. Table 2 provides the level of state funding available compared to the level of funds distributed.

Table 2
California Mathematics Initiative Funding Available vs. Funding Distributed
to Participating Local Education Agencies

Fiscal Year	Funding Available	Funding Distributed²	Undistributed Funds
1999-2000	\$ 1,500,000	\$ 1,006,377.00	\$493,623.00
2000-2001	\$ 1,580,000	\$ 553,132.00	\$1,026,868.00
2001-2002	\$ 1,613,000	\$ 1,545,257.88	\$67,742.12
2002-2003	\$ 400,000	\$ 400,000.00	\$0.00
TOTALS	\$ 5,093,000	\$ 3,504,766.88	\$1,588,233.12

Program and Participant Information

A total of 41 local education agencies participated over the three phases of the program. Thirty-three of these programs served single school districts. Seven programs were consortium programs run by county offices of education. One program was a consortium program run by a school district.

Programs in Phase 1 served 62 participants, an average of approximately five participants per program. Phase 2 programs served 224 participants, an average of approximately 45 participants per program. Programs in Phase 3 have served a total of 274 participants to date, an average of approximately 12 participants per program. These programs have served a total of 560 participants to date.³

As of June 30, 2003, participants had completed a total of 4,974 semester units (or the quarter-unit equivalent) in mathematics or pedagogical coursework, an average of 17.8 semester units per participant. While participant information is currently incomplete, 185 teachers have reached their certification goals as of October 2003. Sixty-one participants obtained full mathematics credentials; 94 obtained supplementary authorizations in mathematics; two obtained multiple

² Indicates funding distributed for use in this fiscal year (not necessarily the fiscal year of appropriation).

³ Phase 3 programs continue to operate through June 30, 2004. Participant and funding information provided herein reflect program results through June 30, 2003.

subject credentials with a concentration in mathematics; and 28 experienced mathematics teachers completed professional development courses.

Funding distributed to participating teachers as of June 30, 2003 totaled \$1,160,709.98, for an average cost of \$233.36 per unit. At minimum, it is estimated that an additional \$500,000 will have been distributed by local education agencies to participating teachers in the 2003-2004 fiscal year. Funds provided to local programs but not distributed to participants either have been or will be returned to the State General Fund.

In establishing loan agreements and formulating individual program participation plans, each participating teacher identified a certification goal to be completed from the program. Participants pursued one of the following goals:

- Obtaining a single subject teaching credential in mathematics;
- Adding a supplementary authorization in mathematics to a credential already held;
- Obtaining a multiple subject teaching credential with a concentration in mathematics;
- Updating mathematics knowledge (for teachers previously credentialed in mathematics that completed subject matter requirements under prior standards.)

The 560 program participants identified their certification goals as is shown on Table 3 below. The majority of participants, approximately 60%, pursued supplementary authorizations in mathematics. Supplementary authorizations may be added to a full teaching credential in another subject area, and are generally issued based on the completion of 20 semester university units in the subject of the supplementary authorization.

The purpose of these supplementary authorizations is to allow fully credentialed teachers to expand their teaching authorization to a new subject area by demonstrating knowledge in the subject to be added. Supplementary authorizations carry a more restricted teaching authorization than full credentials. A supplementary authorization in mathematics authorizes teaching mathematics in grade nine and below.

Most other program participants (36.4%) pursued a full single subject teaching credential in mathematics. Remaining participants were either seeking a multiple subject credential with a concentration in mathematics, or were already fully credentialed mathematics teachers who took courses to refresh or update their mathematics knowledge.

Table 3
California Mathematics Initiative – Participants’ Certification Goals

Certification Goal	Number	Percentage
Single Subject Teaching Credential in Mathematics	204	36.4%

Supplementary Authorization in Mathematics	330	58.9%
Multiple Subject Teaching Credential w/ Concentration in Mathematics	2	< 1%
Experienced Mathematics Teachers Updating Mathematics Knowledge	24	4.3%

Program Coordination and Reporting Requirements

Participating programs were responsible for recruiting and selecting program participants, advising participants on mathematics certification options and requirements, and tracking participants' applicable expenditures and progress toward meeting certification goals. Recruitment was generally provided either through local school districts' existing information distribution system, or by direct contact by the local program director with district leaders, including site principals, mathematics curriculum directors, pre-intern directors and mathematics department chairs.

Programs are required to provide two reports to the Commission each year. First, programs provide names and identify information of participants at each mid-year, as well as the certification goal of each participant and an estimate of the funds to be used by each participant during the year. At the end of each fiscal year, programs have been required to provide complete information on each participant's progress, including certification goal, college attended, applicable units completed, units still needed to reach certification goal, and funding received. Year-end reporting requirements also include a narrative from the local program director describing successes and challenges experienced in the program during the year, and any plans for modification of the original local program structure or practices. (Selected quotes from these narratives are included in the appendix to this report).

The Commission distributes mid-year and year-end reporting forms at appropriate times to assist local program directors in meeting these annual reporting responsibilities. After participating teachers reach their certification goals, the local program director tracks each participant's progress in completing required teaching service. The Commission and local program directors continue to be responsible for tracking completion of coursework and required teaching service in future years until the loans of all participants are reconciled through completion of the service requirement or reimbursement of the loans obtained through this program.

Participating Teacher Progress/Program Results

Participating teachers have been encouraged to complete all courses required for their certification goals during the course of their local program in order to maximize program benefits. Given the duration of local programs, this would require participating teachers to complete their coursework within three years.

However, other responsibilities or the unavailability of required courses may require participants to complete some courses after their local California Mathematics Initiative loan forgiveness program has closed. These participating teachers must then complete remaining courses at their own cost, reach their certification goals, and complete required teaching service in order to have the loans obtained through this program forgiven.

Phase 3 local programs will continue to operate through June 30, 2004. As a result, information about participants' progress is incomplete at the date of publication of this report, and available information is insufficient to accurately project the number or percentage of total program participants who will reach their certification goals.

Preliminary information, however, indicates that a significant number of participants will reach their certification goals and obtain permanent mathematics teacher certification. As of October 2003, 185 teachers have met their certification goal. To date, 155 participants completed requirements for either a Single Subject Teaching Credential in Mathematics or a Supplementary Authorization in Mathematics: 61 participants obtained the full credential, and 94 obtained the supplementary authorization. Two other participants obtained a Multiple Subject Teaching Credential with a concentration in mathematics. Additionally, 28 experienced mathematics teachers were able to attend courses or professional development institutes to update their mathematics knowledge. The number of participants reaching their credential goal is likely to grow substantially as participants complete remaining coursework either through funding from this program or at their own expense.

Standards for the Supplementary Authorization in Mathematics

Assembly Bill 496 also required the Commission to develop standards for teacher certification programs leading to supplementary authorizations, including a supplementary authorization in mathematics. Supplementary authorizations may be added to a licensed teacher's credential as a means to expand the credential authorization, thus allowing the teacher to serve in new subject areas not authorized by the base credential. Supplementary authorizations are commonly used in middle schools because they generally are limited to teaching students in grades nine and below, and provide the assignment flexibility commonly needed at the middle-school level.

As was stated previously, supplementary authorizations are normally issued based on documentation of 20 semester units of university coursework in the subject of the supplementary authorization. AB 496 required the Commission to establish program standards as a basis for developing an alternative to the 20-unit requirement: completion of a Commission-approved standards-based supplementary authorization program at a college or university.

The Commission worked with an advisory panel of mathematics educators in 1999 to develop a set of draft program standards for the mathematics supplementary authorization. These draft standards were presented to the Commission in December 1999. The Commission then authorized their release to the public for review and comment. After receiving and analyzing the public comment, Commission staff met with the advisory panel to make appropriate revisions. The revised standards were presented at the Commission's March 2000 meeting and recommended for approval. The Commission adopted the *Standards of Quality and Effectiveness for Programs of Supplementary Authorization in Mathematics* at its meeting on March 8, 2000.

Despite broad distribution of these standards, the Commission did not receive any supplementary authorization program proposals over the next three years. The continued availability of the 20-unit option for obtaining the supplementary authorization and the more substantial effort required of colleges to develop a standards-based supplementary authorization program likely both contributed to the disinterest in establishing programs based on these standards.

However, in March 2003, the Commission did receive a proposed standards-based mathematics supplementary authorization program proposal from the University of California, Los Angeles. Concurrent with the review of this program proposal and a finding that the proposal met all of the Commission's program standards, state policy work on implementation of the federal *No Child Left Behind Act (NCLB)* determined that assignment of a teacher based on possession of a supplementary authorization could be problematic in meeting the "highly qualified teacher" definition found in NCLB. For this reason, the proposed standards-based supplementary authorization was withdrawn and work on this aspect of this statute was suspended pending further review of the requirements of NCLB.

Lessons Learned – Loan Forgiveness Program

Some successes resulting from the California Mathematics Initiative Loan Forgiveness Program are worthy of recognition. The stated purpose of this program was to, “Provide resources so that as many individual teachers as possible become qualified and certificated to teach mathematics....” Even though complete information is not yet available, partial data show that nearly 200 program participants have obtained new certification to teach mathematics, or have advanced their knowledge in the subject, thereby increasing the quality of their teaching. This number will increase substantially as other program participants complete remaining coursework and reach their certification goals. The increase in the number of certified and competent mathematics teachers resulting from this program will provide a positive effect on the quality of mathematics instruction in California’s public schools.

Some challenges resulting from this legislation were demonstrated as local programs were implemented, however, and these challenges provide information of potential value if similar programs are considered in the future.

Forgivable Loan Structure

While the forgivable loan structure provides a benefit to both the candidate and the local education agency, it also creates two challenges in local program administration: 1) Agencies are required to track participants’ progress and collect funds loaned to candidates who do not fulfill their service obligation; and, 2) This structure provides too little flexibility to candidates in fulfilling their service obligation. The requirement to track participants’ teaching service continues until all candidates either fulfill their service obligations or repay their loans, and thus extends potentially well beyond the duration of the program. In single district programs this may not be as challenging, but in county-based or consortium programs the service tracking process is more difficult. The lack of flexibility in fulfilling the service obligation affects teachers who may need to change employers, or even their form of employment, for various reasons, some of which may not be within their control. This is particularly true for new and aspiring teachers, the most likely participants in this type of program.

Local education agencies that initially expressed interest in the program but later declined participation indicated concerns about their capacity to fulfill participant tracking and loan recovery requirements. This lack of local education agency participation limited the program’s availability in some parts of the state, hindering the overall success of the program. Over the four years during which the state made funding available for this program, only 69% of available funds were distributed to local programs due to the limited number of local program proposals submitted to the Commission.

Participants who do not meet their teaching service obligation are required to repay any funds obtained through this program. Some circumstances make it difficult for local programs to compel participants who do not meet their service obligation to repay the program funds received, such as when a participant leaves the local program's service area to teach elsewhere, or leaves teaching entirely. School districts and county offices of education may not have the means necessary to recover funds from these participants. To ensure success of a loan forgiveness program, it is necessary to initially establish a structure for recovering funds from participants who fail to fulfill program obligations. That structure must be maintained by an organization with the means and authority to take necessary steps to ensure the recovery of program funds in instances that require such action.

The loan forgiveness structure may also have limited local program success in recruiting participants for this program. Several local program directors reported that many teachers initially interested in participating were discouraged by the forgivable loan aspect of this program. Apparently, many teachers were not confident that they would be able to fulfill their teaching service obligations due to a possible future change in location or employment. As a result, they were not willing to take the risk of not completing required service, thus needing to return all funds received through this program. Only three of the 41 programs met their initial projections of the number of teachers to be served by their programs, and all noted some recruiting difficulties. Of the funds distributed to local programs to serve program participants in the first two phases of the program, less than 44% of those funds were used to serve participants. Unused funds were returned to the Commission for reversion to the state's General Fund.

Effects of Cap on Administrative Costs

AB 496 established a cap on the amount of funding to cover local program administrative costs to 6.5% of the total grant received. Indirect cost rates, which are meant to cover general overhead costs for school districts and county offices of education, are set by the California Department of Education and vary broadly (ranging from 0.89% to 34.62% in 2003-2004) due to a number of factors. These rates often fall in the range of 5% to 7% or higher. It is notable that district indirect cost rates generally are at or near the cap for administrative costs set for this program, and often exceed that cap. As a result, agencies administering local programs were required to supplement grant funds with local funds in order to operate effectively. In the fiscal climate under which this program operated, the need to provide supplemental funding from local resources presented a significant challenge.

While the cap ensures that almost all program funds go directly to serve program participants, it also creates the likelihood that local program administration efforts will be limited. This limitation may affect the recruitment and even prospective participant awareness of the existence of the program; the local program's

accuracy and timeliness in providing required reporting information; and the local program's ability to advise participants regularly, track their progress, and recover program funds when necessary.

Complications in Providing Teaching Service Under Current Conditions

Given the implications on teacher employment resulting from NCLB, conditions have changed substantially for program participants since the inception of this program. A majority of program participants established obtaining a supplementary authorization in mathematics as their certification goal in this program. If that authorization no longer allows them to be assigned to a mathematics classroom, the ability of these participants to fulfill their service obligation will be significantly affected.

General changes in teacher assignment options resulting from NCLB have caused some participants to relocate or be reassigned to teach other subjects. While these changes have been beyond participant control, they directly affect participant ability to fulfill their service obligation or, if circumstances dictate, repay funds received through this program. Changing conditions appear to be inherent in the educational system, so it may be appropriate in considering future programs of this type to include provisions for circumstances beyond participant control that allow for the loan to be forgiven through some means other than completion of required service.

Recommendations on Program Continuation, Modification or Termination

While the loan forgiveness program was designed to ease the shortage of mathematics teachers, its structure presented challenges in recruiting participants, and in this case limited success of the program in developing as many mathematics teachers as possible. Due to the administration and recruitment difficulties experienced in the implementation of this program, it is likely that the program would have been more successful if administered either as grant program or a student loan program. The transitory nature of beginning teachers, who comprised the majority of the program participants, does not fit well with the loan forgiveness structure of the program.

The Commission is required by E.C. §44403 to include a recommendation for the continuation, modification, or termination of this program. The requirements of the forgivable loan structure and costs associated with local program administration have led the program to fall short of its intended goals. Lessons learned from the implementation of this program suggest that future initiatives that target teacher shortage areas may be more successful and more cost effective with different loan and administrative structures.

While the Commission supports efforts to recruit qualified and competent teachers, particularly in chronic shortage areas such as mathematics, concerns about the structure of this program lead to the recommendation that this program sunset and become inoperative on June 30, 2004, as initially established in the statute.

Appendix

Selected Comments from Local Program Directors Regarding Administration of the California Mathematics Initiative Loan Forgiveness Program

On program successes...

The teachers participating in the program were genuinely enthusiastic about the (program.) The program enabled some teachers to pursue a mathematics credential who did not previously have the financial resources. – Downey Unified School District (Phase 3)

In the current that has made it more and more difficult for young teachers to complete all of the requirements for a math credential and with increased costs that continue to add up, many saw (this program) as a shining star in the darkness of the credentialing process. It is very difficult to find single subject math teachers in smaller, more rural districts and (this program) allowed for an increased incentive for math teachers to come and stay with the district – Lemoore UHSD (Phase 2)

A long-term side benefit of the program will be an expansion of mathematics knowledge at the elementary schools, particularly in grades 4 and 5. –Lennox School District (Phase 2)

For those participants in the program that have followed through, completed their classes, and received reimbursement monies, the program has been positive. – Barstow USD (phase 3)

On challenges in recruiting participants...

Almost all of our participants are committed to staying in the Imperial Valley and are established members of the communities. We did learn that those who chose not to participate in the program were trying to clear their credential through the single subject exams or did not want to have the loan payback if they left the valley since their spouses were in careers that often transferred them. – Imperial County Office of Education (Phase 3)

To date, there has been adequate interest expressed in the program, but few individuals have actually followed up to take advantage of available funds....This lack of interest has resulted in the district returning all grant funds to the California Department of Education for a similar grant program in mathematics certification. –Antelope Valley UHSD (Phase 1)

We found that teachers are reluctant to sign the contract. They do not want to commit themselves to the district, even if it is only for one year. –East Side UHSD (Phase 1)

It seems that educators have an ever-increasing accountability load that taking additional coursework in mathematics is not a priority. –Fresno USD (Phase 2)

On other challenges in local program administration...

... Some participants are unable to fulfill their service obligation due to loss of employment. This has certainly been a concern, as many districts have laid off teachers, then rehired some after the May revise. We hope all our teachers will find employment, whether or not in the same district in which they started. Because of these unusual circumstances, I hope the need to collect repayment will not arise, at least in the short term. – Kern County Superintendent of Schools (Phase 3)

With the “No Child Left Behind” legislation, Middle School teachers are now inquiring about AB 496 and the possibility of obtaining the single subject credential in math. A good majority of our middle school math teachers hold a multiple subject with a supplementary math authorization. Hopefully we can help many of them before the grant money runs out. – Moreno Valley Unified School District (Phase 3)

With the December 2002 announcement of the state’s fiscal crisis and the reality that no additional funds would be issued for the AB 496 program, the district stopped all recruitment efforts. This was done to ensure that sufficient funds would be available for all active program participants to complete their credentials. – San Diego City Schools (Phase 3)

(This) program was difficult to get started in our district. Teacher contract language did not allow a teacher to have the district pay for a course and still receive credit for upward movement on the salary schedule. The union and the district negotiated an agreement for this to be allowable only for this grant in February 2002. So, although the teachers had received information on the program and were tentatively enrolled, they could not be official participants until February 2002. – San Mateo UHSD (Phase 3)